

Mass Tasks Wizard

Overview

The **Mass Tasks Wizard** is a versatile tool that can be used to create a variety of different **Associate Tasks**.

- Create **Date** driven tasks that recur on a schedule.
- Create tasks for multiple **Associates** at once.
- Create tasks based on criteria from any tab on the **Customer Filter**.
- Create tasks based on criteria from any tab on the **Item Filter**.
- Create tasks based on **Repair** or **Custom Job** criteria.
- Create tasks based on **Special Order** criteria.
- Create tasks based on **Appraisal** criteria.
- Create tasks based on **Customer Sales**.

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Date Related Tasks

Date Related Tasks allow you to create associate tasks that repeat on a set schedule.

To create:

1. Click **Associate > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.
3. Select **Date Related Tasks** at the top. At the bottom, you must define the **Recurrence Pattern**. This is essentially the schedule for when this task will repeat.

Daily	Repeat task every specified number of days, e.g. enter 1 for every day. Also includes option to only repeat every weekday.
Weekly	Repeat task every specified number of weeks, e.g. enter 1 for every week, then select which days of the week the task should repeat on.
Monthly	Repeat tasks every month, either on a specific date or the first/last day of the month.
Recurrence End Date	Tasks will be repeated until this date is reached. Tasks can repeat for up to two years.

4. After setting the **Recurrence Pattern**, click **Next**.
5. Enter the task **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
6. Once complete, the system will display the number of tasks created. Click **Finish** to close the wizard.

Example

A task to do a full physical inventory on the last day of every month.

Task Type	Date Related Tasks
Recurrence Pattern	Monthly Last Day End Date: 2 years from today
Subject	Perform a Physical Inventory
Associate	0 – Any Associate
Category	Inventory
Require Notes on Completion	Yes

Associate Tasks

Associate Tasks allow you to create tasks for multiple associates at once. Tasks can be linked so that when one associate completes it the task is closed for all other associates as well.

To create:

1. Click **Associate > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.
3. Select **Associate Tasks** and click **Next**.
4. Check those associates you wish to create this task for. If you want this task to close for all selected associates once any one of them have completed it, check the **Selected Associates Can Complete** box at the top. Otherwise, each associate will need to complete their task individually.
5. After selecting associates, click **Next**.
6. Enter the task **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
7. Once complete, the system will display the number of tasks created. Click **Finish** to close the wizard.

Example

Task to put up holiday decorations for upcoming season assigned to multiple associates that will close for all once someone completes.

Task Type	Associate Tasks
Selected Associates Can Complete	Yes Select multiple associates
Subject	Put up holiday decorations
Due Date	11/28/2020
Category	Store
Require Notes on Completion	No

Customer Tasks

Customer Tasks allow you to create associate tasks linked to specific customers using the **Customer Filter**.

To create:

1. Click **Associate > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.
3. Select **Customer Tasks** at the top, then click the **Customer Filter** drop-down at the bottom.
4. Specify customer criteria in the **Customer Filter**, then click **OK**. For example, you could use the **Merchandise** tab to create associate tasks linked to customers based on their purchase history.
5. Click **Next**. A list of matching customers will be displayed. Check those customers you want associate tasks created for, then click **Next**.
6. Enter the task **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
7. Once complete, the system will display the number of tasks created. Click **Finish** to close the wizard.

Example

Tasks to contact customers who have wish list items for vendor ABC on their wish list to notify them of new product lines and update their wish lists.

Task Type	Customer Tasks
Customer Filter	Wishes Tab Wish Option: With Wishes That Match... Vendor: ABC
Subject	Contact customer about vendor ABC wishes
Details	Notify customer that new product is in from this vendor, update their wish list
Associate	0 – Any Associate
Category	Customers
Require Notes on Completion	Yes

Item Tasks

Item Tasks allow you to create associate tasks linked to specific items using the **Item Filter**.

To create:

1. Click **Associate > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.
3. Select **Item Tasks** at the top, then click the **Item Filter** drop-down at the bottom.
4. Specify item criteria in the **Item Filter**, then click **OK**. For example, you could use the **Type & Status** tab to create associate tasks linked to items based on their stock type and entry dates.
5. Click **Next**. A list of matching items will be displayed. Check those items you want associate tasks created for, then click **Next**.
6. Enter the task **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
7. Once complete, the system will display the number of tasks created. Click **Finish** to close the wizard.

Example

Tasks for your jeweler to pre-appraise newly entered items from last week.

Task Type	Item Tasks
Item Filter	Type & Status Tab Date Entered: Last Week
Subject	Please complete pre-appraisal

Associate	Your jeweler
Category	Inventory
Require Notes on Completion	No

Repair/Custom Job Tasks

Repair/Custom Job Tasks allow you to create associate tasks linked to repair or custom jobs using the **Job Filter**. These tasks will retain links to the customer record, sales receipt, and job record.

To create:

1. Click **Associate > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.
3. Select **Repair/Custom Job Tasks** at the top, then click the **Job Filter** drop-down at the bottom.
4. Specify job criteria in the **Job Filter**, then click **OK**. For example, you could use the **Status/Dates** tab to create associate tasks linked to all jobs completed but not picked up in the last week.
5. Click **Next**. A list of matching jobs will be displayed. Check those jobs you want associate tasks created for, then click **Next**.
6. Enter the **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
7. Once complete, the system will display the number of tasks created. Click **Finish** to close the wizard.

Example

Tasks for your jeweler to review repairs awaiting estimate and to complete the estimate.

Task Type	Repair/Custom Job Tasks	
Job Filter	General Tab Job Type: Repairs	Status/Dates Tab Complete: Only Incomplete Jobs Estimate Only: Only Estimates
Subject	Please complete estimate	
Details	Review and complete estimate, notate any special conditions	
Associate	Your jeweler	
Category	Services	
Require Notes on Completion	Yes	

Special Order Tasks

Special Order Tasks allow you to create associate tasks linked to special orders using the **Special Order Filter**. These tasks will retain links to the customer record, sales receipt, and special order record.

To create:

1. Click **Associates > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.
3. Select **Special Order Tasks** at the top, then click the **Special Order Filter** drop-down at the bottom.
4. Specify special order criteria in the **Special Order Filter**, then click **OK**. For example, you could create associate tasks linked to all special orders entered this week that have 'Need More Info' checked.
5. Click **Next**. A list of matching special orders will be displayed. Check those special orders you want associate tasks created for, then click **Next**.
6. Enter the **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
7. Once complete, the system will display the number of tasks created. Click **Finish** to close the wizard.

Example

Tasks for your sales manager to review special orders that require more information before they can be ordered.

Task Type	Special Order Tasks
Special Order Filter	Status: Need More Info
Subject	These special orders need more info
Details	Please review and obtain missing info so order can be placed; notate any issues
Associate	Your sales manager
Category	Customers
Require Notes on Completion	Yes

Appraisal Tasks

Appraisal Tasks allow you to create associate tasks linked to appraisals using the **Appraisal Filter**. These tasks will retain links to the customer record, sales receipt, and appraisal record.

To create:

1. Click **Associates > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.

3. Select **Appraisal Tasks** at the top, then click the **Appraisal Filter** drop-down at the bottom.
4. Specify appraisal criteria in the **Appraisal Filter**, then click **OK**. For example, you could create associate tasks linked to appraisals entered last week that are still incomplete.
5. Click **Next**. A list of matching appraisals will be displayed. Check those appraisals you want associate tasks create for, then click **Next**.
6. Enter the **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
7. Once complete, the system will display the number of tasks created. Click **Finish** to close the wizard.

Example

Tasks to follow up with customers on appraisals that are ready for pick up.

Task Type	Appraisal Tasks
Special Order Filter	Include: Only Completed Appraisals Include: Only Not Picked Up Appraisals
Subject	Appraisal ready for pick up – notify customer
Associate	0 – Any Associate
Category	Services
Require Notes on Completion	No

Sales Tasks

Sales Tasks allow you to create associate tasks linked to customer sales using the **Sales Filter**. These tasks will retain links to the customer record and sales receipt.

To create:

1. Click **Associates > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **New Tasks** and click **Next**.
3. Select **Sales Tasks** at the top, then click the **Sales Filter** drop-down at the bottom.
4. Specify sales criteria in the **Sales Filter**, then click **OK**. For example, you could create associate tasks linked to all the sales made last week by a specific associate.
5. Click **Next**. A list of matching sales will be displayed. Check those sales you want associate tasks created for, then click **Next**.
6. Enter the **Subject** and choose the **Associate** to assign it to. All other fields are optional. Click **Next** to generate the tasks.
7. Once complete, the system will display then umber of tasks created. Click **Finish** to close the wizard.

Example

Tasks for salesperson John Smith to follow up with a thank you on his sales from last week.

Task Type	Sales Tasks
Sales Filter	Sale Date: Last Week Sold by: John Smith
Subject	Thank you follow up
Associate	John Smith
Category	Customers
Require Notes on Completion	No

Editing Tasks

Tasks previously created with the **Mass Tasks Wizard** can be edited en masse. Note this only works for tasks created in this way; individually created tasks cannot be updated here.

To edit existing tasks:

1. Click **Associates > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **Edit Existing Tasks**, use the drop-down to select the group of tasks you wish to edit, then click **Next**.
3. Make any desired changes to the task, then click **Next** and **Finish** to update existing incomplete tasks. Note that completed tasks will not be changed.

Deleting Tasks

Tasks previously created with the **Mass Tasks Wizard** can be deleted en masse. Note this only works for tasks created in this way; individually created tasks cannot be deleted here.

To delete existing tasks:

1. Click **Associates > Tasks > Mass Tasks Wizard**, then click **Next**.
2. Select **Edit Existing Tasks**, use the drop-down to select the group of tasks you wish to delete, check the **Delete Incomplete Tasks** option, then click **Next** and **Finish**.
3. Incomplete tasks from this task group will be deleted. Note that completed tasks will not be deleted.